Instructions for:

Tier 2 Businesses (MBE/WBE) participation reporting on created Purchase Orders.

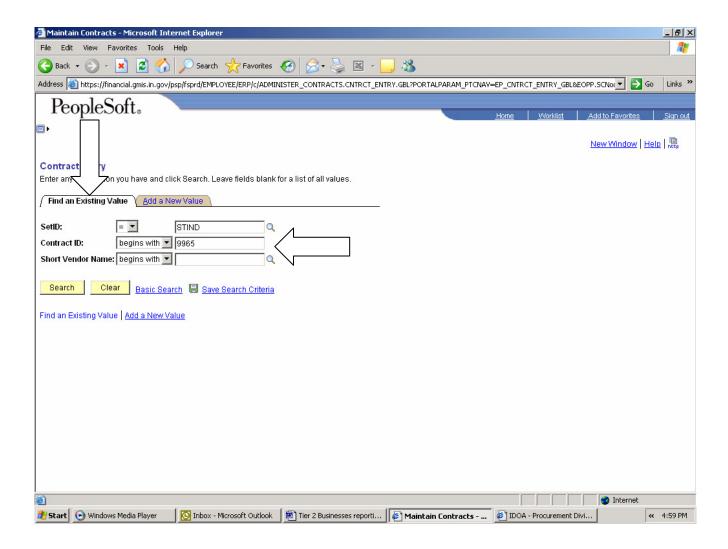
Originally the Tier 2 Min Bus tab was where a user would report if any MBE/WBE participation occurred on the awarded PO. The Tier 2 Min Bus tab has been updated. The Tier 2 Min Bus tab has been changed to the Tier 2 Details tab. You will be able to view the original Tier 2 Min Bus tab but all information will be grayed out and will not be able to be changed. The new Tier 2 Details tab in the Maintain Purchase Order module is now for the reporting of any Minority or Women owned business use by the awarded vendor for completion of the award. These instructions will help you complete the Tier 2 Details tab during the completion of your Purchase Order. The system will not allow you to save the Purchase Order unless you have completed the following steps.

Step 1:

Determine if items on Purchase Order came from a QPA. If the items were not from a QPA then skip to Step 4. If the items were from a QPA you will need to first determine the MBE/WBE percentages and vendors for the QPA before completing the process.

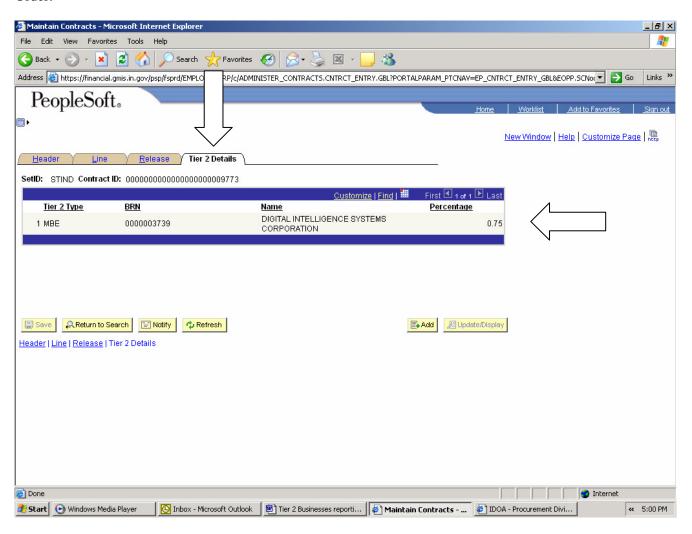
Step 2:

Find MBE/WBE percentages on QPA contract by following this navigation: <u>Purchasing>Procurement Contracts>Maintain Contracts</u>. Select the Find an Existing Value tab. Then, enter the QPA number into the Contract ID, as it is displayed on the Procurement website in the QPA listing, and click Search.



Step 3:

Click on the Tier 2 Details tab to see the MBE/WBE participation on the QPA contract. Copy the MBE/WBE participation information down for entry into your Purchase Order. Make sure you record all four pieces of information. Continue to Step 4 to complete the process of entering the Tier 2 information into your Purchase Order.

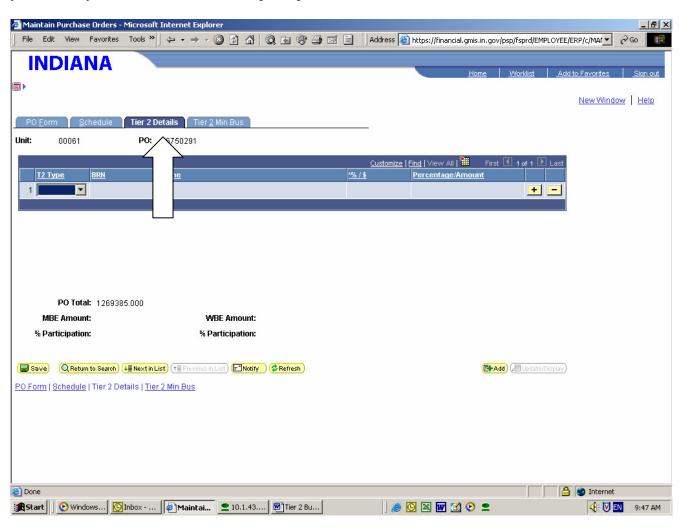


Step 4:

At the Manage Purchase Order screen you will select your Purchase Order.

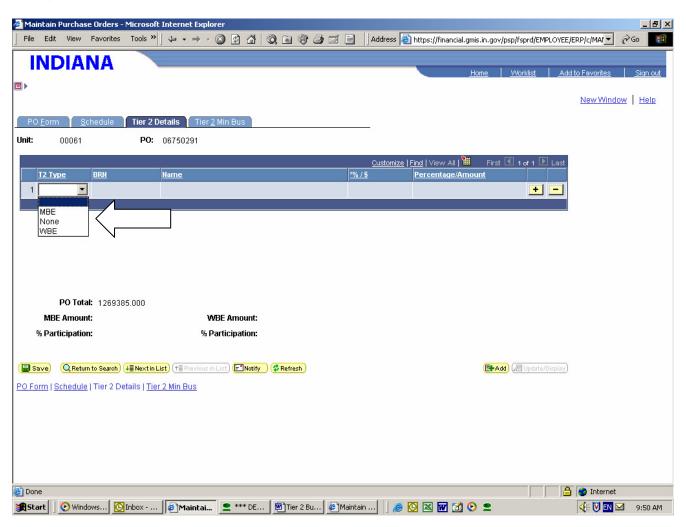
Step 5:

Once you get to the appropriate Purchase Order you will see four tabs at the top of the screen. They are PO Form, Schedule, Tier 2 Details, and Tier 2 Min Bus. You will need to click on the Tier 2 Details tab to enter your Minority or Women owned business participation.



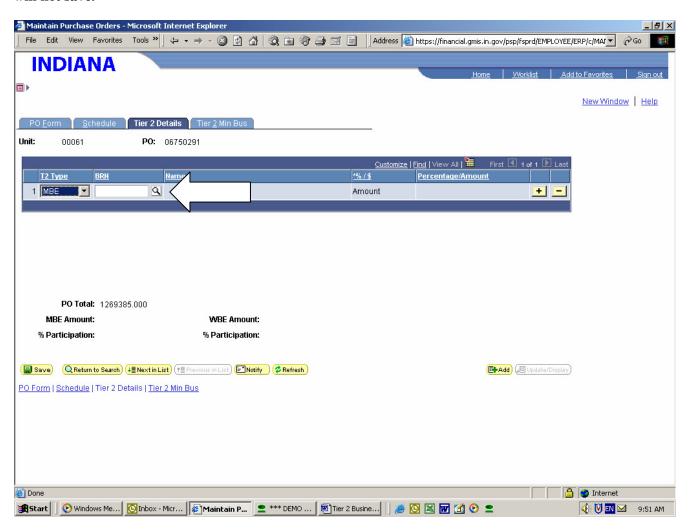
Step 6:

Once you have clicked on the Tier 2 Details screen you will first have to select the T2 Type by clicking on the drop down arrow below the T2 Type field and select the type of participation you have on this PO, from the information listed on the Minority and Women's Business Enterprise Participation Plan from your complete bid package. You can select MBE, WBE or None. If you have no MBE/WBE participation you will need to select none and then save and you are done. Otherwise select the first type of participation and continue to Step 7.



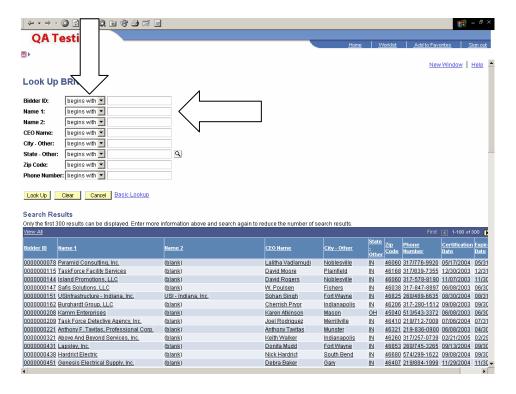
Step 7:

Once you have selected the type of participation it will open a new field under the **BRN** (bidder registration number) heading. This field will allow you to select only certified MBE/WBEs. The listing you will see will be based on the Tier 2 Type (T2 Type) you have selected. If you selected Minority all you will see are the certified Minority Businesses. **You can not select the prime vendor as the MBE/WBE vendor on the PO because it will not save.**



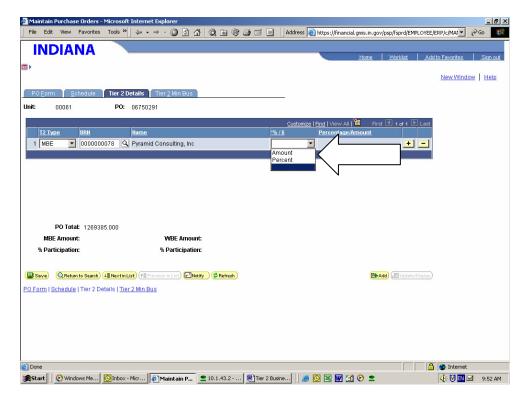
Step 8:

You will need to see if the vendor listed on the Minority and Women's Business Enterprise Participation Plan. To obtain a searchable listing of all certified vendors you will need to click on the magnifying glass icon. The best way to search is by the company name (Name 1). You should change the **begins with** to **contains** and use a portion of the company name. Once you have found the correct vendor click on the vendor link and it will fill the BRN and Name fields or if you know the M/WBE bidder number, you can type it in once you have selected the Tier 2 Type and it will populate the vendor name.



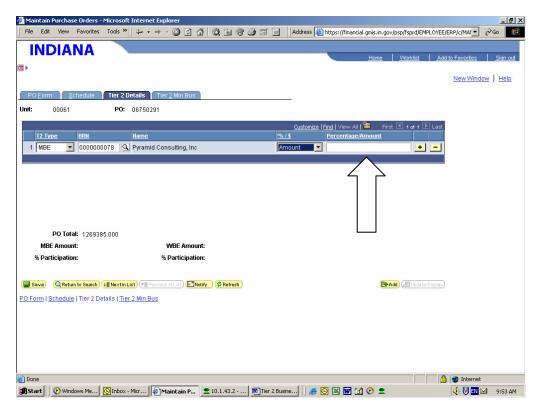
Step 9:

Once you have selected the correct vendor the field %/\$ will open for you to complete. You will need to click on the drop down arrow and select Amount or Percent depending on the information you have.



Step 10:

Once you have selected to use Amount or Percent the field titled Percentage/Amount will open for you to place either the amount of participation by dollar amount or percentage of the contract.



Step 11:

To add any additional participation for this PO, you will click on the yellow + to add a new row of information and then follow all the steps for each additional participation entry. Once you have entered all participation for the PO you will then click save and the system will calculate the MBE and WBE participation and dollar amount total for you, the total for the participation can not be 100%. If you list 100% MBE/WBE participation you will get an error and not be able to save this PO.

